

### MISSION & VISION Fully Invested in What Comes Next

**THE MISSION** of the AiP Foundation is to encourage and support the professional education of advisors in philanthropy and to increase the public's awareness that such advisors exist.

**OUR VISION** is one where communities across America are strengthened by increased charitable giving and responsible stewardship of charitable funds

**WHAT WE DO** We provide assistance in the form of scholarships to individuals who are interested in the field of philanthropy and dedicated to improving their community. We broaden the public's understanding and acceptance of the designation of Chartered Advisor in Philanthropy (CAP) or any other professional designation dedicated to philanthropic advice.

#### Why the CAP designation?

There are many excellent resources for philanthropic education. We have determined, however, that the coursework in the American College of Financial Services' Chartered Advisor in Philanthropy program is most worthy of our support. The CAP program is unique in that it combines financial, tax, and legal coursework along with instruction on how to collaborate with non-profit executives and other professional advisors. CAP trained professionals are uniquely skilled to help clients through the very important processes of estate, financial, or business transition planning.

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### CAP SUCCESS STORIES

#### Ginni Galicinao, CAP, Aspen, CO

*In 2015, AiP Foundation awarded its 100th scholarship! To mark this milestone, we wanted to hear from our 1st scholarship recipient, Ginni Galicinao, CAP, to see how she's using her CAP Designation.*



Ginni Galicinao is a CAP who comes from a background as an executive coach and working with major donors. Ginni says, "The CAP program is fabulous and was invaluable for me. I continue to refer back to the CAP materials whenever I have questions or need clarification." Ginni believes all of her training and experiences provide her with the tools to have those sometimes scary conversations. She asks powerful, deep and insightful questions. She helps clients determine what philanthropy looks like for them, the change they want to effect in the world, and how to engage the rising generation in the family's philanthropy.

We asked if she thinks others can do what she does without a financial, tax or legal background. She thinks they can, but it's hard work. "It's really helpful if you have an existing network. This is a trust building business. Clients have to have complete trust in your abilities, your confidentiality, and that you have their best interests at heart at all times." Ginni works with a wide range of individuals from upper middle income to ultra high net worth families. She believes that "anyone can be a philanthropist. Whether you volunteer or donate a dollar a year or give many millions of dollars, it's about stretching yourself to give more, and to give and participate in more thoughtful and strategic ways. We all give at different levels and each individual's gift is to be honored and of tremendous value."

*AiP Foundation thanks Ginni Galicinao for sharing her success story with us!*

*For the full interview with Ginni, including more information about her business model, visit:*  
[www.advisorsinphilanthropy.org/?page=CAPScholarship](http://www.advisorsinphilanthropy.org/?page=CAPScholarship) or  
[facebook.com/advisorsinphilanthropyfoundation](https://www.facebook.com/advisorsinphilanthropyfoundation)

#### Scholarship Program: 102 scholarship recipients since 2010

- 59 are Female; 44 are Male
- 48 Advisors; 54 Nonprofit Executives including 27 from Community Foundations
- 25 States represented: AL, AZ, CA, CO, CT, FL, IA, IN, KS, KY, LA, MA, MO, NC, NE, NH, NY, OH, PA, SC, TX, UT, VA, WA WI
- 16 have paid it forward and become donors to AiP Foundation

**Public and Professional Awareness Program:** "Why Become a CAP" powerpoint educational tool will be unveiled at the 2016 Conference and made available afterwards to any CAP to help increase awareness about the CAP profession. Your donations will keep this program moving forward with a second powerpoint "Why You Should Work With A CAP" for CAPs to present to the public (libraries, public forums, etc.). A video with the same public message is also planned.

Dear Colleagues and Friends,

2015 was a very productive year!

I first want to acknowledge and thank our 2015 donors for making the work of the Foundation possible. All of our donors are fully invested in what comes next!

We would like to thank Sally Alspaugh, a Fithian Leadership award winner, who served two consecutive terms on our board. We wish her all the best leading the National CAP study group!

We are proud to announce the addition of two new board members:

**Barry Nickelsberg, CAP, Chief Development Officer, Estate & Gift Planning at The Carter Center**

**Alan Pratt, CAP, of Pratt Legacy Advisors, former President of AiP**

In 2015 the Foundation Board focused its efforts on the following:

- Granting our 100th! Scholarship
- Developing our public awareness powerpoints based on the results of the 2015 AiPF survey of CAPs
- Expanding our data and reach to all CAPs
- Revising and updating our scholarship distribution policy
- Collaborating with American College, AiP, and other philanthropic advisor leaders across the country
- Reaching out to corporate donors
- Continuing the Annual Talent Show Fundraiser which raised \$18,000 at the 2015 Conference
- Raising funds to support our Scholarship program

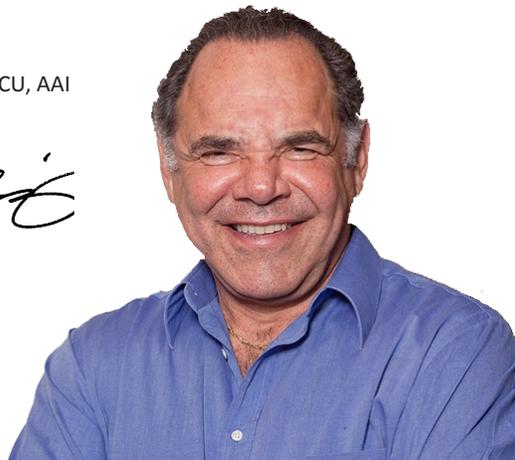
The board appreciates and recognizes the importance of your financial assistance in our efforts to pursue our mission. Any gift you can make to the Foundation will help us carry out our mission to increase the advisor in philanthropy population and inform the public about the profession. Please respond to our electronic appeals and visit [www.advisorsinphilanthropy.org/donations](http://www.advisorsinphilanthropy.org/donations) to make a tax deductible gift to the Foundation.

Please keep in mind that we are always interested in reaching out to corporate donors. The opportunity to multiply the impact of their charitable gifts might be attractive to a corporate grant-maker. If you have contacts with potential corporate donors who would benefit from the opportunity of collaborating with the AiP Foundation, please refer them to any board member.

The Foundation continues to be Fully Invested in What Comes Next. We are looking forward to sharing the work product of our efforts, our powerpoint series. The Foundation board believes the powerpoints we are creating will raise the public awareness of our philanthropic advisor profession.

All the best,

Les Winston, CAP, CPCU, AAI  
President

## YOUR DONATION

Please visit us at  
[advisorsinphilanthropy.org/Foundation](http://advisorsinphilanthropy.org/Foundation)  
to make a donation.

## DID YOU KNOW?

Donors and grantmakers may earmark funding for nonprofit professionals and/or for enhancing philanthropy within their community.

## 2015 DONOR CIRCLES OF GIVING

### PLANNED GIFTS

Frank & Roseanne Mauro Charitable Trust beneficiary to honor Lesley Winston, CAP

### \$1,000+ LEADERSHIP

James Adams, CAP  
Monroe Diefendorf, Jr., CAP  
Ino Halegua to honor Lesley Winston, CAP  
Gerald Horwitz, CAP  
John Sullivan  
Adrian Young, CAP  
Drake Zimmerman, CAP

**Total donations  
received in 2015:  
\$24,800**

### \$500+ MENTOR

Sally Alspaugh, CAP  
Ashar Group to honor Todd Healy, CAP  
Nancy Baker, CAP  
Joseph Cohen  
Susan Edwards Colson

Alan Loss  
Laura Malone, CAP  
Alan Pratt, CAP Robert  
Thompson, CAP

### \$250+ PREMIER

Phil Cubeta, CAP  
Anthony de Bruyn, CAP  
Todd Fithian  
Suzanne Rohlf, CAP  
Johnne Syverson, CAP  
Curtis Wiedeman

### \$100+ CENTURION

Pamela Averick, CAP  
Barnes & Noble Booksellers  
Randall Borkus  
Randy Fox  
Brian Kasal, CAP

Michael Kohner, CAP  
Peter Liefer  
Steven Meyers  
A. Duer (Bud) Pierce, CAP

### \$25+ FRIENDSHIP

Sheila Gidley  
Ellen Israelson  
David Taylor, CAP